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Correspondence Memorandum

Date: September 22, 2025

To: Budget and Operations Committee
Employee Trust Funds Board

From: Pam Henning, Assistant Deputy Secretary
Office of the Secretary

Subject: ETF Organizational North Star Metrics Report

This memo is for informational purposes only. No Board action is required.

Attached is the Department of Employee Trust Funds (ETF) scorecard for the period ending June 30, 2025. These performance measurements provide the Board an objective way to measure progress toward ETF's four strategic goals and represent the fourth reporting period for the FY2025 ETF Scorecard. Of the seven measurements for which we have available data, four are on track, two are at risk, and one is significantly off track. Highlighted below are those measurements with notable changes.

Goal 1: Create an effortless customer experience.

- **Customer Experience Feedback Score:** Compared to the previous quarter, this measurement changed from "on track" to "at risk." The aggregate score, which is based on weighted scores for customer satisfaction, ease of effort and the Net Promoter Score, decreased by 2.8 points. Contributing factors include:
 - The overall customer satisfaction score decreased by 2 points. While the score remained the same for retirement appointments, it decreased for the call center and ETF website.
 - The overall ease of effort score declined by 7 points. This is primarily due to members reporting frustration with logging in to access their Statements of Benefits in the My Benefits Portal, a new offering to members as of March 2025 that acted as a soft rollout of the portal prior to the My Insurance Benefits go-live.
 - The Net Promoter Score, a metric used to measure customer loyalty and satisfaction, remained consistent at 98.

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Goal 2: Implement outcomes-driven performance measurement and process management.

- **Percent of milestones completed on schedule, as defined in the Initiative Operationalize process management for all IAS-impacted process owners:** The strategic initiative aligned with this measurement seeks to optimize Insurance Administration System (IAS) future-state processes to leverage new modernization capabilities. This initiative continues to be delayed due to resource constraints and is being re-evaluated during the FY2026 Strategic Planning cycle. This measurement is reporting “significantly off track.”

Goal 3: Build a talented and agile workforce

- **Percent of IAS-impacted positions indicating their competency level for critical non-technical skills is at least a “Meets,” as determined by the bi-quarterly assessment tool:** This measurement is reporting “at risk” due to the variance between the current fiscal year target and current period actual results as determined by the bi-quarterly Digital Dexterity assessment tool. This assessment is given during Q2 and Q4. During this period, a multi-survey comparison was done from the baseline of 93% in Q2 to the second survey conducted during this period. 6.82% of respondents scored below “meets” on the overall combined questionnaire while 93.18% scored at “meets” or above. It is worth noting that the overall self-assessed score increased slightly over the baseline due to gains made in several of the scoring components. We will reassess future target setting goals for measurements based on survey results in future scorecards to provide a more accurate account of strategic initiative progress.

The work supporting this measurement was completed timely and includes identifying, assessing current vs. future skill requirements, and providing non-technical learning and development resources to the individuals in those ETF positions facing the greatest impact to their current roles resulting from the IAS project. During this reporting period, a series of Digital Dexterity educational articles were published in the ETF Community blog, and eLearning modules were built and launched to reinforce related skills, which include:

- “Building Digital Dexterity through Problem-Solving”
- “Digital Dexterity: Data Literacy”
- “Digital Dexterity: Learning Agility”

Goal 4: Implement modern, secure and resilient information technologies.

- **Percent of Key Risk Indicators that are within established risk thresholds:**
This measurement has been meeting or exceeding its annual target during the FY2025 reporting cycle as it focuses on the security of ETF's information and information resources. The measurement is comprised of five Key Risk Indicator areas, which provide a holistic view of ETF's security posture. Two of these areas exceeding their quarterly target include:
 - Incident response: ETF responded to 981 alerts, with 966 (98.5%) addressed within Service Level Agreement, an improvement over prior quarters and above the defined measurement target.
 - Employee Security Awareness: efforts to ensure a proactive, risk-aware culture, include training and testing ETF staff on various threats. During this reporting period, staff participation in annual training remained high, with 99% completion (424 of 429 staff). In ongoing phishing simulations, staff demonstrated strong awareness with a 99% compliance rate (1,319 of 1,326), reflecting progress in encouraging a risk-aware culture.

Staff will be at the Committee and Board meetings to answer any questions.

Attachment A: [ETF Scorecard FY2025 Q4 \(April 1 - June 30, 2025\)](#)